



# A Global Energy Major

## CRM Strategy Development

### Project Brief

Our client, an emerging powerhouse of the offshore IT industry, is a strategic partner to a leading international energy major. All areas of our client's business have shown phenomenal growth and the expectations of our client's partner go beyond the traditional "bread and butter" of offshoring. The energy major looks to its strategic IT partners to provide thought leadership and best in class capability in supporting the business needs of processes that are increasingly globally streamlined.

The energy major had developed a local CRM tool. This tool was identified in September 2004 as the target CRM and Sales MI tool for its B2B Division. At this stage our client was engaged to globalise the custom tool, however delivery challenges beset efforts and led to curtailment of 'early adopter' deployments in the US, UK, Germany and Australia during 2006-7. The failure of these deployments fundamentally impacted the business case.

During 2006, it was identified that substantial further investment would be needed over the next 3 years to enable rollout and sustainable user adoption of CRM in combination with the a planned Global SAP deployment and also a new desktop environment. Consequently the CRM Steering Group endorsed a study to review the strategy and approach to CRM before committing to further investment.

Barnsnake Consulting was invited to provide business input into the resulting CRM strategic study. The aim of the study was to develop a sustainable CRM Roadmap that reflected broader CRM best-practice, market evolution and learning's to date, and to guide future investment in line with stated business needs and priorities.

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### What Barnsnake Did

The study comprised of a business assessment and solution assessment, and encompassed the following global Classes of Business; Lubricants, Chemicals, Commercial Fuels, Marine, Aviation, Bitumen and Cards.

Barnsnake quickly deployed a business analyst to help shape the business assessment. The first stage was to liaise with external market analysts to understand best practices and associated learning's within the CRM area and how these would be best applied to guide and shape the CRM journey.

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**... provide a pragmatic business focused viewpoint to a highly sensitive area ...**

The next step was to develop a CRM Framework, a common language to facilitate CRM understanding across the businesses and to focus and drive individual discussions. In addition a set of “big rules” were developed to assist in challenging the true business requirement need. The rules reflected not only external learning’s but also incorporated those from previous project experiences. These were important to ensure the CRM journey was business-owned, aligned with business strategy and guided by tangible business objectives.

Conducting interviews and working sessions with the business, the study group shared the CRM framework and documented the different business strategies, goals and pressures associated with each business. Refining these business priorities with reference to the CRM framework and big rules /best practice a set of high-level requirements and priorities were developed for each Class of Business.

These requirements were then synthesized as a group to find alignment and areas with common energies and appetite, to produce a CRM roadmap for the next 36 months, driven by the sales framework and business processes and aligned to business needs and objectives.

## **Outcome and Benefits**

Being able to provide a pragmatic business focused viewpoint to a highly sensitive area Barnsnape’s assistance immediately enhanced its client’s capability. By focusing on delivering business outcomes, we were able to progress the study within the short timeframe and define a set of recommendations which were bought into by the business and senior stakeholders.

Specific outcomes included:

- An agreed set of big rules and business principles to define and continue to drive the CRM journey
- An understanding of the different expectations, aspirations and appetites of the different Classes of Business
- A high level set of phased requirements to be used in determining the business fit (or not) of existing CRM projects and also to provide and entry point into the next phase of the project
- A renewed focus within the business on CRM and the sales processes
- Senior stakeholder approval to proceed to a project mode to continue the CRM journey.

The energy major recognised the business benefits. It also appreciated that the rapid deployment of Barnsnape resources delivered an immediate step-up in performance to the overall partnership.

## **For more information**

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